



State of New Jersey
DEPARTMENT OF BANKING AND INSURANCE
DIVISION OF INSURANCE
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JAMES E. MCGREEVEY
Governor

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HOLLY C. BAKKE
Commissioner

March 5, 2004

RE: Application for a Special Permit to Issue Charitable Gift Annuities in New Jersey

Dear Applicant:

This will acknowledge your request for an application for a Special Permit to issue Charitable Gift Annuities in New Jersey. Please find enclosed the following items:

1. The application for the Special Permit.
2. Checklist of documents and/or information required of the applicant organization.
3. Proposed Form of Resolution.
4. Copy of N.J.S.A. 17B:17-13.1 (Charitable Annuities).
5. Copy of Order A04-107.
6. Copy of N.J.A.C. 11:4-8 (Charitable Annuities).
7. Copy of N.J.A.C. 11:4-26 (Annuity Mortality Tables).
8. Copy of N.J.S.A. 3B:20-11.1 (Prudent Investor Act).
9. A blank copy of the Annual Statement of the Segregated Gift Annuity Fund.

I have enclosed the list of documents and/or information (item #2) required to accompany the completed application form. When you submit the necessary documents and/or information, please number each item to correspond with the number on the checklist.

If your organization qualifies, please complete the enclosed application and return it to my attention with all of the documents and/or information required of the applicant organization.

Organizations that have issued annuities shall submit an Annual Statement of the Segregated Gift Annuity Fund of the applicant organization along with the application. The Annual Statement should be as of December 31 of the prior year.

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BE ADVISED THAT NO GIFT ANNUITY AGREEMENTS MAY BE ENTERED INTO BETWEEN THE APPLICANT AND NEW JERSEY RESIDENT DONARS UNTIL THE REFERENCED SPECIAL PERMIT IS ISSUED. Please advise if any such New Jersey annuity agreements have been issued prior to your request for this application.

The Department may request additional information in the future. Thank you for your attention in this matter. If you need any further information, please do not hesitate to contact me.

Sincerely,

Adelaide Phelan

Adelaide Phelan
Life and Health Division
e-mail: aphelan@doh.state.nj.us

Enclosures